



Process Documentation

Department:

Customer Support

Last Updated:

4/11/2025 11:34 AM

NAME OF PROCESS

Exchanging Equipment - Jobsite [Roleplay]

Use Case / Objectives

If an asset breaks down or becomes damaged in the middle of a rental - or if the customer decides it is not meeting their needs - you may need to exchange it for another machine. This guide walks you through the process of exchanging equipment on an open rental with pickup/delivery at the jobsite.

Configuration, Training, and Reporting

This document assumes you know how to perform basic Search functionality to find information in the system (i.e., F4 search). The steps for this are not included within this document.

Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.

Menu options to access:

Main Operations => Create Single Contract Pickup Ticket

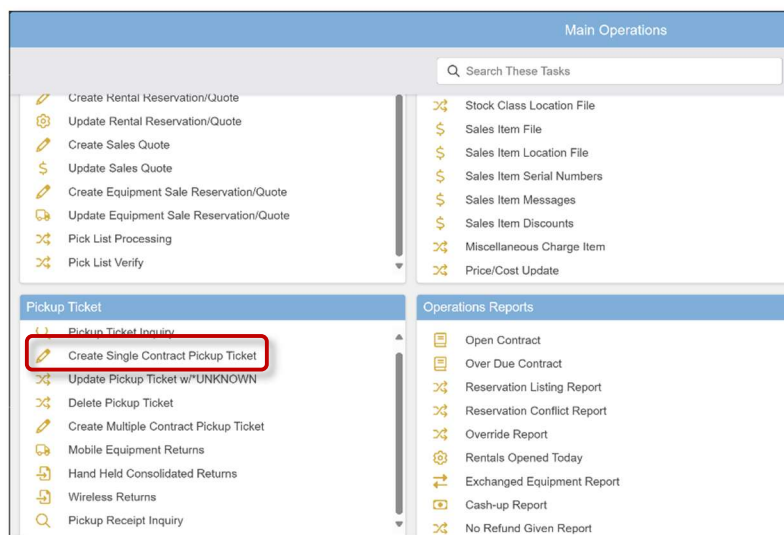
Main Operations => Exchange Equipment

Exchanging Equipment - Jobsite

Generating an Exchange Pickup Ticket

Before exchanging equipment on a jobsite, generate a pickup ticket for the exchange; this section outlines the steps. If you already have a pickup ticket created, skip to the [Exchange Equipment](#) section.

1. Log into the [Roleplay Environment](#) using your credentials.
2. If the **Main Operations** screen does not appear automatically, select **Main Operations** from the left toolbar.
3. In the **Pickup Ticket** section, click **Create Single Contract Pickup Ticket**.



- a. The **Create Pickup Ticket - Launch** screen opens.

The screenshot shows the 'Create Pickup Ticket' launch screen. At the top left, the date and time are '2/19/25 10:11:42'. At the top right, the title is 'Create Pickup Ticket'. The form contains the following fields:

- Cust name/#:
- or - Contract #:
- or - Equipment #:
- Ordered by:
- Pickup date:
- Pickup time:
- Exchange: (Y/N)

4. Type Y in the *Exchange* field.
5. Type the customer name/number, contract number, or equipment number into the corresponding fields.

NOTE: If you do not know this information, press F4 to search.

Cust name/#: 799

- or - Contract #:

- or - Equipment #:

Ordered by:

Pickup date: 2/19/25

Pickup time: 10:11

Exchange: Y (Y/N)

6. Press Enter.
 - a. The customer number was entered for this example, the **Open Equipment by Customer** screen opens.

2/19/25 10:19:16 Open Equipment by Customer

Customer name or #: 799 Project #:

-or- D/L state and #: Job #:

Select- Open rentals: Y Reservations/quotes: N Starting cat/class:

Customer name: Turnkey Customer 2 Include bulk items: Y

Type option, press Enter or delimit the list with the filters.

1=Select 5=Display 6=Reprint 7=Fax PO#:

Op	Contract	Equipment#	Qty	Description	Loc	Job Location	Job Name
<input type="checkbox"/>	69204	1419	1	CRAWLER DOZER 105-20	DMO	456 MAIN ST, GREENWO	Turnkey Custome
<input type="checkbox"/>	69204	1463	1	OPERATOR	DMO	456 MAIN ST, GREENWO	Turnkey Custome
<input type="checkbox"/>	69266	1197	1	LIGHT TOWER	DMO	456 MAIN ST, GREENWO	Turnkey Custome
<input type="checkbox"/>	69266	4175	1	LIGHT TOWER	DMO	456 MAIN ST, GREENWO	Turnkey Custome
<input type="checkbox"/>	69266	9167	1	LIGHT TOWER	DMO	456 MAIN ST, GREENWO	Turnkey Custome

7. Type 1 in the *Op* column next to the equipment to be exchanged.

1=Select 5=Display 6=Reprint 7=Fax PO#:

Op	Contract	Equipment#	Qty	Description	Loc	Job Location	Job Name
<input type="checkbox"/>	69204	1419	1	CRAWLER DOZER 105-20	DMO	456 MAIN ST, GREENWO	Turnkey Custome
<input type="checkbox"/>	69204	1463	1	OPERATOR	DMO	456 MAIN ST, GREENWO	Turnkey Custome
<input type="checkbox"/>	69266	1197	1	LIGHT TOWER	DMO	456 MAIN ST, GREENWO	Turnkey Custome
<input checked="" type="checkbox"/>	69266	4175	1	LIGHT TOWER	DMO	456 MAIN ST, GREENWO	Turnkey Custome
<input type="checkbox"/>	69266	9167	1	LIGHT TOWER	DMO	456 MAIN ST, GREENWO	Turnkey Custome

8. Press Enter.

- a. The **Create Pickup Ticket Details** screen opens, displaying all equipment on the contract.

2/19/25 10:22:39 Create Pickup Ticket

Contract #: 69266
 Job location: 456 MAIN ST, GREENWOOD Print:
 Driver: Print an additional copy at location: Fax/Email:
 Pickup Qty on Total Weight: 0

Qty	Ping	Equipment#	Cat-Clss	Rent	Description	Yard Weight
<input type="text"/>		1197	60-0300		1 LIGHT TOWER	<input type="text"/>
New eqp#:		<input type="text"/>	Reason: <input type="checkbox"/>			
<input type="text"/>		4175	60-0300		1 LIGHT TOWER	<input type="text"/>
New eqp#:		<input type="text"/>	Reason: <input type="checkbox"/>			

- 9. Type 1 in the **Qty** field next to the equipment to be exchanged and press Enter.

2/19/25 10:26:57 Create Pickup Ticket

Contract #: 69266
 Job location: 456 MAIN ST, GREENWOOD Print:
 Driver: Print an additional copy at location: Fax/Email:
 Pickup Qty on Total Weight: 0

Qty	Ping	Equipment#	Cat-Clss	Rent	Description	Yard Weight
<input type="text"/>		1197	60-0300		1 LIGHT TOWER	<input type="text"/>
New eqp#:		<input type="text"/>	Reason: <input type="checkbox"/>			
<input type="text" value="1"/>		4175	60-0300		1 LIGHT TOWER	<input type="text"/>
New eqp#:		<input type="text"/>	Reason: <input type="checkbox"/>			

- 10. In the **New eqp#** field, type in equipment number for the new piece of equipment.
NOTE: Press **F4** to search if equipment number is unknown.

- a. The **Create Pickup Ticket** screen refreshes to display the new equipment number, its cat-class, and the hours out for the entered/selected equipment number.

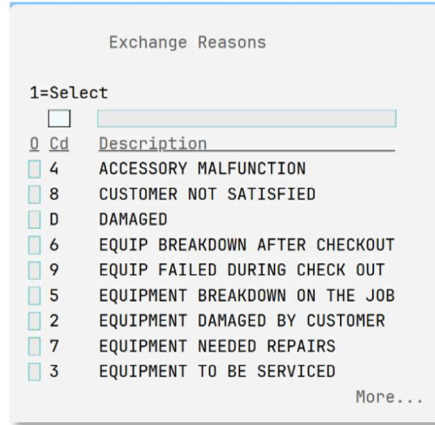
2/19/25 10:30:04 Create Pickup Ticket

Contract #: 69266
 Job location: 456 MAIN ST, GREENWOOD Print:
 Driver: Print an additional copy at location: Fax/Email:
 Pickup Qty on Total Weight: 0

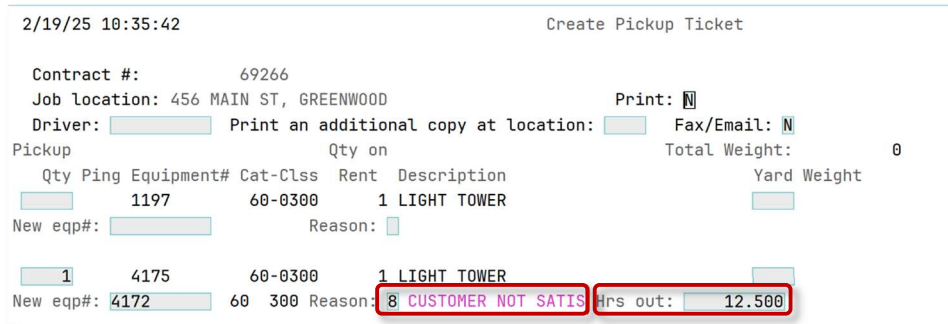
Qty	Ping	Equipment#	Cat-Clss	Rent	Description	Yard Weight
<input type="text"/>		1197	60-0300		1 LIGHT TOWER	<input type="text"/>
New eqp#:		<input type="text"/>	Reason: <input type="checkbox"/>			
<input type="text" value="1"/>		4175	60-0300		1 LIGHT TOWER	<input type="text"/>
New eqp#:		<input type="text" value="4172"/>	60	300	Reason: <input type="checkbox"/>	Hrs out: <input type="text" value="12.000"/>

11. Type in the *Reason* field or press F4 to open the **Exchange Reasons** pop-up window.

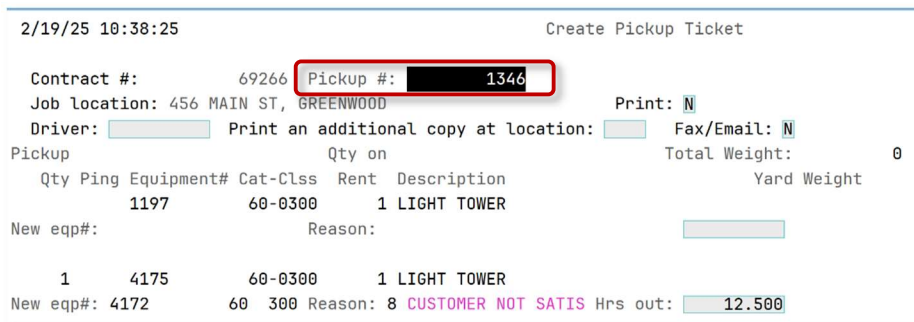
NOTE: The reason codes are user-defined. These are maintained in the Miscellaneous Reason Code file, (DEFAULT CODES). The exchange reason codes are type RE. If you need additional information regarding reason codes, please contact our customer support.



12. If necessary, update the value in the *Hrs out* field.
 - a. The entered/selected values display in the corresponding fields.



13. Verify the changes and press Enter twice to print the pickup ticket.
 - a. The **Create Pickup Ticket** screen opens with the new pickup ticket number noted.



14. Press Enter to complete.

- a. The **Truck Dispatch Display** screen opens listing all pickups in the system. **NOTE:** There are 2 entries for the steps above; one is to pick up the damaged piece of equipment and the other is to deliver the replacement.

2/19/25 10:41:03 Truck Dispatch Display Sys: DEMO V12
 Sorted by: Date, Truck, Load, Seq# Mode: All Locs Invoice: [] Cmp: RM Loc: DMO
 Options: Options: 2=Change 3=Copy 4=Delete 5=Display 9=Lin Cmt or Status: A,C,D or *
 Open: Posted: From: 2/18/25 To: 2/19/25 Eqp #: [] Cat-class: [] - [] Exp timer: (Y/N/O) Tot wght: []

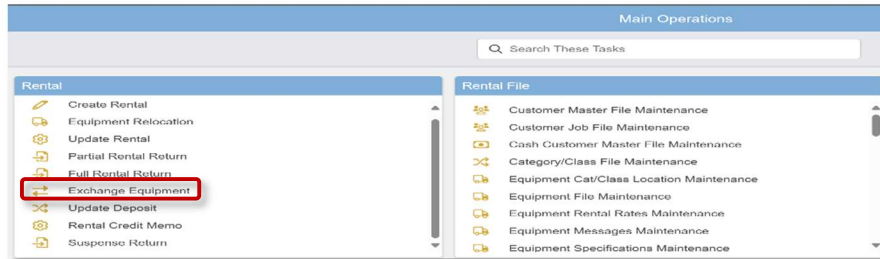
O	S	C	Time	Date	Truck #	Load/Seq	Equipment	M	Job Loc	Qty	Loc
<input type="checkbox"/>	D		10:11	2/19/25	[]	[]	LIGHT TOWER	N	456 MAIN ST, GREENWOOD	1.00	DMO
<input type="checkbox"/>	P		15:17	2/19/25	[]	[]	LIGHT TOWER	N	456 MAIN ST, GREENWOOD	1.00	DMO
<input type="checkbox"/>	P		10:11	2/19/25	[]	[]	LIGHT TOWER	N	456 MAIN ST, GREENWOOD	1.00	DMO

- 15. Press F3 to exit/return to the **Main Operations** screen.

Exchange Equipment

The steps below are a continuation of [Generating an Exchange Pickup Ticket](#). If a pickup ticket has been created, begin the exchange here.

1. In the **Rental** section, click on **Exchange Equipment**.



- a. The **Equipment Exchange - Launch** screen displays.

2/19/25 10:56:30 Equipment Exchange Sys: DEMO V12
 Cmp: RM Loc: DMO
 DEMO

Contract #:

- or -

Equipment #:

- or -

Pickup ticket:

Exchange date:
 Exchange time:

2. Type in the **Pickup Ticket** field and press Enter.

- a. The **Equipment Exchange** screen opens and there is a 1 next to the piece of equipment being exchanged.

2/19/25 11:05:06 Equipment Exchange Sys: DEMO V12
 Currency: USD Cmp: RM Loc: DMO
 Mode BY C/C

Type option, press Enter.
 1=Exchange equipment

Rental Equipment

Opt	Equipment	Qty	Description
<input type="checkbox"/>	1197	1	LIGHT TOWER
<input checked="" type="checkbox"/>	4175	1	LIGHT TOWER
<input type="checkbox"/>	9167	1	LIGHT TOWER

Total Weight: 0
 Old Equip #

3. Press Enter.

- a. The **Equipment Exchange Detail** screen opens displaying the equipment you are picking up and the equipment you are delivering.

2/19/25 11:07:35 Equipment Exchange Detail

Equipment In

Equipment #: 4175 Category/Class: 60 300 Req cat/class:
 Make: I-R Model: LTSRC Model year: 08
 Serial #: IR-460
 Description: LIGHT TOWER
 Quantity: 1 Discount: Yard:
 D/W: Minimum Hourly Daily Weekly Monthly
 Rates: 100.00 100.00 700.00 2800.00
 Hrs #1 out: 16.000 Hrs #1 in: Tot #1 hrs:

Exg reason: 8 CUSTOMER NOT SATISFIED Damage:

Equipment Out

New equip #: 4172 Category/Class: 60 300 Weight:
 Make: I-R Model: LTSRC Model year: 8
 Serial #: IR-457
 Description: LIGHT TOWER
 Hrs #1 out: 12.500

- 4. For **Equipment In**, type in the hours on the unit that is being returned in the *Hrs #1* field.

Equipment In

Equipment #: 4175 Category/Class: 60 300 Req cat/class:
 Make: I-R Model: LTSRC Model year: 08
 Serial #: IR-460
 Description: LIGHT TOWER
 Quantity: 1 Discount: Yard:
 D/W: Minimum Hourly Daily Weekly Monthly
 Rates: 100.00 100.00 700.00 2800.00
 Hrs #1 out: 16.000 **Hrs #1 in: 16.50** Tot #1 hrs:

- 5. Press Enter.
 - a. The **Rental Exchange Prompt Charges** screen displays.

2/19/25 11:11:06 Rental Exchange Prompt Charges Sys: DEMO V12
Cmp: RM Loc: DMO

Out date/time: 2/18/25 15:09 In date/time: 2/19/25 10:56 1 Dys 4.21 Hrs

Equipment Description	Prompt Chg	Stk/C.	UOM	Quantity	Price	Amount
4175	DIESEL	FUEL	GL	<input type="text"/>	6.950	<input type="text"/>
LIGHT TOWER	DIESEL FUEL					

- 6. If any fuel was used, type in the *Quantity* field and press Enter.

- a. The value entered displays, and the *Amount* field updates accordingly.

2/19/25 11:13:23 Rental Exchange Prompt Charges Sys: DEMO V12
Cmp: RM Loc: DMO

Out date/time: 2/18/25 15:09 In date/time: 2/19/25 10:56 1 Dys 4.21 Hrs

Equipment Description	Prompt Chg	Stk/C.	UOM	Quantity	Price	Amount
4175 LIGHT TOWER	DIESEL DIESEL FUEL	FUEL	GL	1.00	6.950	6.95

- 7. Press Enter to continue.
 - a. The **Equipment Exchange Detail** screen displays again.

2/19/25 11:15:51 Equipment Exchange Detail

Equipment In

Equipment #: 4175 Category/Class: 60 300 Req cat/class:
 Make: I-R Model: LTSRC Model year: 08
 Serial #: IR-460
 Description: LIGHT TOWER
 Quantity: 1 Discount: Yard:
 D/W: Minimum Hourly Daily Weekly Monthly
 Rates: 100.00 100.00 700.00 2800.00
 Hrs #1 out: 16.000 Hrs #1 in: 16.500 Tot #1 hrs: .500

Exg reason: 8 CUSTOMER NOT SATISFIED Damage:

Equipment Out

New equip #: 4172 Category/Class: 60 300 Weight:
 Make: I-R Model: LTSRC Model year: 8
 Serial #: IR-457
 Description: LIGHT TOWER
 Hrs #1 out: 12.500

- 8. Press Enter to continue.
 - a. The **Equipment Exchange** screen displays again showing the old equipment and the new equipment.

2/19/25 11:17:30 Equipment Exchange
Currency: USD

Type option, press Enter.
1=Exchange equipment

Rental Equipment Total Weight: 0
Old Equip #

Opt Equipment	Qty	Description	Old Equip #
<input type="checkbox"/> 1197	1	LIGHT TOWER	
<input type="checkbox"/> 4172	1	LIGHT TOWER	4175
<input type="checkbox"/> 9167	1	LIGHT TOWER	

- 9. Press Enter.

a. The **Equipment Exchange Review of Charges** screen opens.

```
2/19/25 11:19:44                               Equipment Exchange Review of Charges
Contract #:      69266
Customer #:      799 Turnkey Customer 2

Rental out date/time:  2/18/25 15:09 Tuesday
Rental in  date/time:  2/19/25 10:56 Wednesday
Rental period:         1 days   .00 hours

Fuel charges:         6.95
Sales tax:             .54
Total invoice amount: 7.49
```

10. Press Enter twice to write the contract and return to the **Main Operations** screen.

Reference Glossary

Field Definitions for Tasks

Create Pickup Ticket Launch

- *Customer number or name* - Enter the account number or the name (or the Search Word) of the charge customer. If you do not know the name or the number, press F4 in this field to access Customer Search.
- *Contract number* - Enter the number of the rental contract for which you want to create a pickup ticket.
- *Equipment number* - Optionally, enter the number of the equipment on the contract that is being picked up.
- *Ordered by* - Enter the name of the customer contact who requested the pickup.
- *Pickup date* - Enter or accept the date of the rental pickup. This is the date that the rental contract will stop billing until the return is processed.
- *Pickup time* - Enter or accept the time of the rental pickup.
- *Exchange* - Indicate if this pickup is for an exchange.

Create Pickup Ticket Details

- *Contract number* - Displays the number of the contract for which the pickup ticket is being created.
- *Job location* - Displays the location of the job for which the pickup ticket is being created.
- *Print* - Indicate whether you want to print the pickup ticket.
- *Driver* - Enter the truck driver's name.
- *Print an additional copy at location* - If applicable, enter the location where a copy of the pickup ticket should print.
- *Fax/E-mail* - Indicate if you want to fax or e-mail the pickup ticket information. If you enter Y, the Fax/E-mail Window appears when you are done with entry of the pickup ticket.
- *Pickup Quantity* - Enter the quantity to pick up for each piece of equipment on the rental contract.
- *Ping* - If the equipment is GPS-tracked, indicate if you want to send a signal to the GPS tracking device on the equipment to pinpoint its position.
- *Equipment Number* - Displays the number of the equipment on the rental contract.
- *Category/Class* - Displays the ID of the category/class for the equipment.
- *Quantity on Rent* - Displays the quantity of the equipment on rent.
- *Description* - Displays a description of the equipment on rent.

Equipment Exchange Launch

- *Contract number* - Enter the number of the rental contract for which the customer is exchanging equipment.
- *Equipment number* - Optionally, enter the number of the equipment the customer is exchanging.
- *Pickup ticket number* - Optionally, enter the number of a pickup ticket that was previously entered to pick the equipment up from the customer.
- *Exchange date* - Enter the actual date of the exchange. If you enter a date that is earlier than the last billed through date, a warning message appears, and you must determine if you need to issue credit to the customer.
- *Exchange time* - Enter the actual time of the exchange.

Equipment Exchange

- Rental Equipment:
 - *Equipment* - Displays the number for the equipment being exchanged.
 - *Quantity* - Displays the quantity of the equipment being exchanged.
 - *Description* - Displays the description of the equipment being exchanged.
 - *Old Equipment Number* - After exchange details are entered, this field displays the number of the equipment that was returned in the exchange.

Equipment Exchange Detail

- Equipment In:
 - *Equipment number* - Displays the unique number assigned to the equipment that is being exchanged. The number cannot be changed on this screen.
 - *Category/Class* - Displays the category/class number to which the equipment is assigned. The number cannot be changed on this screen.
 - *Requested category* - Displays the original category requested by the customer. This field is populated when the category changes at the time you select the equipment to go out on the exchange and that equipment is in a different category.
 - *Requested class* - The original class requested by the customer. This field is populated when the class changes at the time you select the equipment to go out on the exchange and that equipment is in a different class.
 - *Make* - Displays the make (manufacturer's type) for the equipment.
 - *Model* - Displays the manufacturer's model for the equipment.
 - *Model year* - Displays the year of the model for the equipment.
 - *Serial number* - Displays the equipment's unique serial number.
 - *Motor Vehicle* - Indicates whether this piece of equipment is classified as a vehicle.
 - *Description* - Displays the description of the equipment.
 - *Quantity* - Displays the quantity being exchanged.
 - *Discount* - Displays the discount percentage applied when the equipment was rented.
 - *Minimum Rate* - Displays the minimum amount charged for rental of this equipment.
 - *Hourly Rate* - Displays the hourly rate charged for rental of this equipment.

- *Daily Rate* - Displays the daily rate charged for rental of this equipment.
- *Weekly Rate* - Displays the weekly rate charged for rental of this equipment. This is typically 4 times the daily rate.
- *Monthly Rate* - Displays the monthly rate charged for rental of this equipment. This is typically 3 times the weekly rate.
- *Mileage/Hours #1 out* - If applicable, displays the meter reading when the equipment went out on rent.
- *Mileage/Hours #1 in* - If applicable, enter the current meter reading for the equipment coming in on the exchange.
- *Total #1 Mile/Hours* - If applicable, displays the calculated total miles or hours for the equipment coming in.
- *Fuel code* - If applicable, displays the code for any fuel the equipment requires.
- *Gallons* - If applicable, enter the number of gallons of fuel put in the equipment when it came back to the yard.
- *Amount* - If applicable, enter the total monetary amount for the refueling.
- *Exchange reason* - Enter a code that describes the reason for the exchange. These codes are set up under miscellaneous reason code RE. If you do not know the code, press F4 to open the **Exchange Reasons** pop-up window.

Exchange Reasons

1=Select

<u>Cd</u>	<u>Description</u>
4	ACCESSORY MALFUNCTION
8	CUSTOMER NOT SATISFIED
D	DAMAGED
6	EQUIP BREAKDOWN AFTER CHECKOUT
9	EQUIP FAILED DURING CHECK OUT
5	EQUIPMENT BREAKDOWN ON THE JOB
2	EQUIPMENT DAMAGED BY CUSTOMER
7	EQUIPMENT NEEDED REPAIRS
3	EQUIPMENT TO BE SERVICED

More...

- *Damage* - Indicate whether equipment is damaged.